

# APPRENTICESHIPS AT AJ BELL



## Introduction

“An apprenticeship with AJ Bell is a fantastic way to start your career.

“We value our apprentices and the contribution they make to AJ Bell very highly. As an AJ Bell apprentice, you’ll be working and learning in an environment that will support you with your studies and also in your personal and professional development.

“As you read on, we hope that you’ll be inspired to achieve your extraordinary as an AJ Bell apprentice.”

*Lucy Kidson, Apprenticeship Programme Manager - AJ Bell*



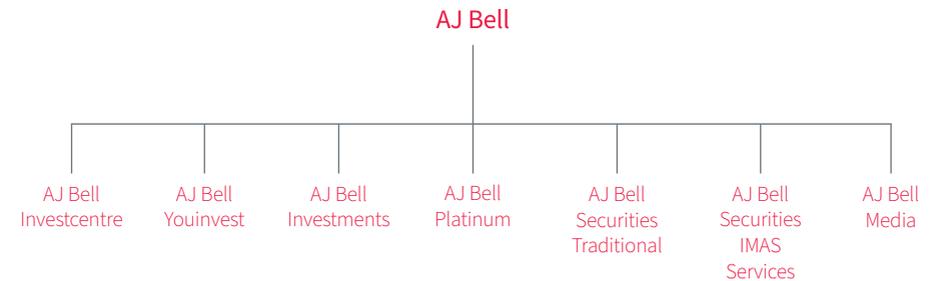
## About us

In 1995, our founders – Andy Bell and Nicholas Littlefair – started the company in a tiny office in Manchester with just £10,000 in personal loans. Their entrepreneurial spirit, ambition and vision for the industry fuelled the company’s growth, so that today it is one of the UK’s largest investment platforms. In December 2018 we reached a significant milestone when we listed on the Main Market of the London Stock Exchange.

We believe in supporting our customers to invest in the life they want to live, so we aim to make the whole investment process as easy and straightforward as possible. This means offering a range of products that match our customers’ needs, keeping our charges low, and ensuring that our people are among the best in the industry.

### Product summary

As well as providing online investment platforms for financial advisers and DIY investors, we also offer bespoke pension services, deliver investment management solutions, and run the media business behind titles like Shares magazine. The various different parts of the AJ Bell Group are shown below.



Over **398,000** customers trust us with their investments



**£75.6 billion** of assets under administration



Over **900** employees

# Our apprenticeships

We offer a choice of two apprenticeship programmes to give you the opportunity to gain experience in a fast-growing, award-winning business, while working towards a professional or academic qualification.

Our **Investment Operations Specialist** route is designed to help you develop a wide range of skills and competencies, including developing your verbal and written communication skills, working to deadlines and understanding operational business processes. You will also gain experience of working with Microsoft packages and using our in-house IT systems.

The ongoing training, development and coaching we provide will really help to progress your understanding of financial services – all while earning a competitive salary.

Throughout the two-year contract, you will work towards an industry-recognised professional qualification, whilst following one of the Financial Services Apprenticeship Standards, the Level 4 Investment Operations Specialist Apprenticeship. In addition, you will complete in-house technical training and, if you are successful in your apprenticeship, there will be opportunities to continue your career at AJ Bell, focusing on either a managerial or a technical career path.

Our **Digital Technology** path has been designed for those who want to develop a career in an area that plays a huge role at AJ Bell.

During this four-year programme you will spend time in different teams in our Technology Services Department, including Engineering, Infrastructure, Data Management, Cyber Security, and IT Services.

At the same time as learning on the job, you will study for a BSc in Digital Technology Solutions with our academic provider, Manchester Metropolitan University. You will be given the opportunity to specialise in Software Engineering, Data Analysis, Cyber Security Analysis or IT Analysis, which will then be the focus of your degree studies from your second year. As well as having a day each week studying at university, your fees will be paid and you'll be earning a competitive salary.

We ask the following from applicants to our apprenticeship programmes:

- For our Investment Operations candidates we require a minimum of 104 UCAS points (under the new tariff for courses starting from September 2017)
- For our Digital Technology path we require a minimum of 112 UCAS points (under the new tariff for courses starting from September 2017)
- Minimum of five GCSEs at grades A – C or 4 – 9 (including Maths and English)
- Ability to demonstrate why you want to work within the financial services industry or demonstrate your passion for digital technology
- Enthusiasm to learn and develop in different teams within the business
- Willingness to follow our guiding principles

## Our apprenticeship programmes

Whether you go down the Investment Operations or Digital Technology apprenticeship route, you will enjoy a tailored induction programme, after which you will have the opportunity to experience different teams within AJ Bell. This gives you the chance to get to know our business and develop your skills on the job, while at the same time continuing on a development programme designed to help you invest in your personal growth and your future with AJ Bell. You will also benefit from the support of a dedicated mentor from within the business.

If you are thinking of applying, or you are a parent or teacher who'd like to know more about our apprenticeships, take a look at our FAQs on pages 10 and 11.

To find out more visit [ajbell.co.uk/careers/our-apprenticeships](http://ajbell.co.uk/careers/our-apprenticeships)

# Progression at AJ Bell

We are very proud that many senior members of our team joined the business in entry level roles, and have since seen their careers develop in line with the growth of the company.

Our apprenticeship programmes are an opportunity to gain hands-on experience across a wide range of disciplines, helping you to develop a deeper understanding of the business and where you want to focus your future career path.

Lauren, Dan and Kiera have all reached different stages of their career journey.

## Lauren

“I joined the business at the age of 17, deciding that whilst university wasn’t the right path for me, I still wanted the opportunity to continue my education, whilst also gaining work experience. Now I am Client Services Manager, with responsibility for overseeing a team of around 25 people.”

## Dan

“I have recently graduated from the two-year Investment Operations Specialist Apprenticeship and have secured a full-time role in the Business Development Team.

“I joined the programme after completing my A Levels, choosing this route instead of university. Looking back, I am so proud of my decision; I have thoroughly enjoyed the programme and I feel I have really firm foundations on which to build my career.”

## Kiera

“I recently started the Digital Technology Apprenticeship, which enables me to study for a degree whilst gaining invaluable work experience. I can already feel myself growing in confidence – I have been given lots of responsibility from the outset, and I feel inspired by my team and the people around me.”



## Thea

“I would recommend AJ Bell because the people are so friendly and welcoming. Everyone wants to see you progress and develop your career.”



## Max

“An apprenticeship with AJ Bell offers exciting development opportunities. Everyone within AJ Bell is highly valued.”



## Georgia

“Doing an apprenticeship at AJ Bell has allowed me to develop all the skills I need to progress my career.”



## Celebrating your success

We are very proud of the hard work put in by all of our apprentices, and the valuable contribution they make to the business. We like to recognise your achievements and celebrate the next step in the development of your career with AJ Bell.

Our latest cohort of apprentices marked the successful completion of their programme with a ceremony, where they received their awards in front of senior leaders – including our CEO Andy Bell and members of our Executive Management Board – as well as their own managers, colleagues and mentors. We also offered the opportunity to invite friends and family to share in their success and celebrate their achievements.



## Working at AJ Bell

We know that our people are the driving force behind our success, so we strive to create a working environment in which everyone feels happy, motivated and valued.

We are very proud to have been named as one of the Sunday Times 100 Best Companies to Work For in the UK for the last four years.

### Giving something back

We encourage our employees to give something back, so our dedicated Internal Events Executive runs a range of events throughout the year to get involved with. From volunteering at local homeless charities, to taking part in our own AJ Bell Bake Off competitions, you will find lots of opportunities to make a difference.

We also offer matched funding up to £100 for employees who are fundraising for their own charities through personal challenges.

### Social events

Whilst we expect our employees to work hard, we also know how important it is to let your hair down and get to know your colleagues away from your desk. You'll enjoy lots of social events throughout the year, including Christmas and summer parties, and free drinks on our roof-top terrace every pay day.

### Achieving your extraordinary

We're committed to helping our people develop, excel and achieve their own version of extraordinary. Whatever your career goals, our dedicated in-house Learning and Development team is here to support you every step of the way.



# FAQs

## Why should I do an apprenticeship?

An apprenticeship is a great way to start your career because it offers a genuine job with training, allowing you to earn whilst you learn and gain a recognised professional qualification. Choosing an apprenticeship over university means you won't need to worry about tuition fees.

With an apprenticeship you build valuable skills through on-the-job training. And it's much more than just gaining a qualification: you are given the support to develop and demonstrate the knowledge, skills and behaviours of a well-rounded professional in your chosen field.

## Why should I do an apprenticeship at AJ Bell?

At AJ Bell we help people to invest – and for our apprentices that means investing in their personal growth, their careers and their future at AJ Bell. We offer the opportunity to build a career with one of the UK's fastest-growing digital investment platforms. At the same time you'll be learning on the job and working with some of the best people in the industry.

We'll support you in your studies to gain a highly regarded professional/academic qualification (equivalent to a Foundation Degree or BSc depending on which programme you follow), and provide a comprehensive learning and development programme that continues with you throughout your career, even after you have completed your apprenticeship. You'll also have the support of a dedicated mentor. All of this whilst you earn a competitive salary too.

There are many reasons to choose AJ Bell for your career choice. Some of those include our discretionary bonus scheme, our award-winning office, our free on-site gym, and even the chance to have roof-top drinks with your colleagues on

pay day! We've also been named as one of The Sunday Times 100 Best Companies to Work For in the UK three years running.

## Am I guaranteed a job at the end of my apprenticeship?

During your apprenticeship you will have regular catch-ups and performance reviews with your line manager so you can see how you are progressing. If you perform well during your time with us and complete your apprenticeship you will be offered a permanent job.

## What do I wear?

We operate a smart/casual dress code which is based on having a smart appearance without the need to wear traditional office attire – but you can still wear traditional office dress if you prefer. Friday is a 'dress down' day when you can wear more casual clothing, including jeans and trainers.

## What are the working hours?

Our normal working hours are 8.45am to 5.15pm - Monday to Friday. As an apprentice, we will ensure you are able to fulfil the requirement for 20% of your time to be spent developing your skills and the knowledge required to do the job. You will also be given time to study for your exams.

## Where are AJ Bell's offices?

You will be based at our office at 4 Exchange Quay (EQ4) on Salford Quays. EQ4 is a fantastic, modern office with great facilities. These include a lounge, dining area, a roof-top terrace and a gym on the premises which is free of charge. In fact, our office has been rated as the top office in Manchester, and it came fifth in a global ranking of places to work.

The closest Metrolink stop is Exchange Quay, which is a two minute walk from our office.

We also have an office on Southwark Bridge Road in central London. As well as being the home of AJ Bell Media and AJ Bell Youinvest, this is where our Public Relations team is based.

Being close to the offices of so many major media organisations is a real benefit to our spokespeople, because it means they can react quickly to any PR opportunities that arise. As a result, Russ Mould, Tom Selby and Laura Suter are now regularly invited to share their expertise in a variety of newspapers, magazines, radio programmes and television news items – all of which really helps to strengthen recognition of, and trust in, the AJ Bell brand.

## How do I apply?

If you would like to apply for our Investment Operations Specialist apprenticeship or our Digital Technology apprenticeship, please submit your CV and a covering letter explaining why you would like to work in financial services and why you would like to join the relevant AJ Bell apprenticeship programme. You will find our apprenticeship vacancies at [www.ajbell.co.uk/careers/vacancies](http://www.ajbell.co.uk/careers/vacancies).

You may then be invited to have a telephone interview with us, during which we'll spend a little time getting to know you better. If you are successful at this stage we will ask you to attend one of our apprenticeship programme assessment days.



# Our guiding principles

At AJ Bell our purpose is to help people invest, and we do this by following a set of guiding principles that define the company. These principles inform everything we do, creating a culture in which we strive to think like our customers, make investing easier and lead our markets.

## Straightforward

We make investing easy and accessible

## Intelligent

We know our stuff.

## Personal

We are human. Not robots

## Principled

We do the right thing

## Focused

We give customers what they need. Not what they don't

## Energetic

We never stand still



## Our sporting partners

At AJ Bell, we want to help more people enjoy secure, healthy, happy lives up to a ripe old age. We can assist with the money side of things by making the whole investment process more straightforward. And by supporting high-profile sporting events, teams and athletes, we can help to raise awareness of the positive impact that sport can have on your physical and mental wellbeing.

We are proud to be associated with all of the following sporting partners:

- AJ Bell World Triathlon Leeds
- Sale Sharks
- AJ Bell National Squash Championship

## EQ4

As an apprentice, you will be based at our head office at 4 Exchange Quay (EQ4) in Salford Quays. The building is a fantastic, modern, open plan space that has been designed specifically to support the requirements of our business. It has a dedicated learning and development suite, e-learning zone, dining area, lounge and roof-top terrace, as well as an on-site gym that is managed by our own personal trainers, and is free for our employees to use.

EQ4 is easily accessible by tram from various locations across Greater Manchester. The closest tram stop is Exchange Quay, which is a two minute walk from our office.



# Health and wellbeing

Your physical and mental health and wellbeing are very important to us. That is one of the reasons we have our very own gym on site, which is free for our employees to use and offers a range of activities to suit everyone, from yoga and fitness classes to run clubs.

We recognise the impact of your work-life balance on your health: your paid holiday entitlement starts at 24 days (plus bank holidays) increasing to 30 days with length of service, and you have an opportunity to buy and sell holidays should you need to.

Safeguarding forms parts of our commitment to the welfare of our apprentices; this will be outlined to you when you start. Furthermore, we have an Employee Assistance Programme that you can contact 24/7 for support regarding any issues impacting your wellbeing. We also have mental health first aiders – employees in the business who are trained to help you take care of your mental health.





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[ajbell.co.uk](http://ajbell.co.uk)